

Initial Face-to-Face Contacts

Note: In order to create an initial face-to-face contact, an assignment to the case is not needed.

Introduction

The following guide walks through multiple ways of creating an Initial Face-to-Face Contact for Assessment, and how to create an Initial Face-to-Face Contact for Ongoing.

Assessment Face-to-Face Contacts

Note: In order to create an Assessment Face-to-Face Contact, there must be a pending Assessment for the case. There are three ways to create an Assessment Face-to-Face Contact: the Create Case Work page, the Actions hyperlink next to the case, and the Assessment page.

1. To create an Assessment Initial Face-to-Face Contact via the Create Case Work page, go to the Cases tab and click the Create Case Work hyperlink [Create case work](#). On the Create Case Work page, select Assessment > Initial Face-to-Face Contact. Select the case and the participant(s) and click 'Create.' This will open the Case Notes page.
 - You can also create a case note by selecting Create Case Note from the Actions drop-down next to the specific case. This will open the Case Notes page.

Create Case Work - Internet Explorer

eWiSACWIS

Create Case Items

- Administration
- Adoption
- Agreements/Notices
- Assessment
 - Initial Face-to-Face Contact
- Case/Perm Plan
- Education
- Eligibility
- ICPC
- ICWA
- Imaging
- Legal
- Narrative

Cases

Display, Financial (8215649)
Test, Case (70000000)

Case Participants

Hold down the 'Ctrl' key for multi-selection

- On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the Search hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants group box, you can change the selected participants by clicking on the desired names. Use the 'Ctrl' key to select more than one participant. Click the Add Contacts hyperlink to add them to the Assessment Contact Information group box, shown on the next page.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

The screenshot shows the 'Case Notes - Windows Internet Explorer' window with the 'eWiSACWIS' header. The page contains the following fields and sections:

- Case Information:**
 - Case: Jones, Sally (9222753)
 - Worker Creating Note: Cake, Caitlin M.
 - Worker Making Contact: Cake, Caitlin M. [Search](#)
 - Case Note ID: 9223452
 - Date Entered: 02/06/2012 02:22 PM
 - ☐ Note Finalized
 - ☐ Contact By Designee
- Note Information:**
 - Date: 02/06/2012
 - Category: Initial Assess Contact
 - Begin Time: 01:00 AM ☒ PM
 - Type: Initial Face-to-Face
 - End Time: 00:00 AM ☐ PM
 - Type Detail:
 - Duration: 0000.0
 - Face-to-Face Location: Home Visit
 - Face-to-Face Result: Occurred
 - ☐ Billable
 - ☐ View Inactive Participants
 - Participants:**
 - Jones, Dirk (Present Spouse)
 - Jones, Mary (Bio Child)
 - Jones, Robert (Bio Child)
 - Jones, Sally (Reference Person)
 - Jones, Tammy (Bio Child)
 - Jones, Tommy (Bio Child)
 - Hold down the 'Ctrl' key for multi-selection
 - [Add Contacts](#)
- Narrative:**
 - Case Note 1/1 [Details](#)
 - [Create Structured Case Note](#)
 - Enter narrative text here...
 - [More...](#) [Less...](#) [Default](#)
- Options:** [Go](#)
- [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

The browser status bar at the bottom shows 'Done', 'Trusted sites | Protected Mode: Off', and a zoom level of 100%.

- The participants selected in the Participants group box at the top of the page pre-fill in the Assessment Contact Information group box. To add participants not listed in the Participants box above, click the Insert button. The Begin Date is the date and time the Assessment this note is being linked to was created.

Case Notes - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

hold down the Ctrl key for multi-selection
[Add Contacts](#)

Narrative

Case Note 1/1 [Details](#)

Enter narrative text here...

[More...](#) [Less...](#) [Default](#)

Assessment Contact Information

Assessment Contact Information

Begin Date: 02/03/2012 12:25 PM

Name	Affiliation	Title	Contact Date	
Jones, Sally			02/06/2012 01:00	<input type="radio"/> AM <input checked="" type="radio"/> PM Delete
Jones, Tommy			02/06/2012 01:00	<input type="radio"/> AM <input checked="" type="radio"/> PM Delete

[Insert](#)

Options: [Go](#) [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

Done Trusted sites | Protected Mode: Off 100%

- Click the Save button to save the page, then click the Close button.

5. To create an Assessment Initial Face-to-Face Contact via the Assessment page, access the pending Assessment from your desktop. This will open the Assessment page.

eWiSACWIS

Case Work Provider Work Search Refresh

Create Maintain Utilities Adoption Search Help

Dan Daisy's Desktop

☒ Date Restricted ☐ Participant View ☐ View Not Approved/Cancelled

Ticklers

Cases (32)

Harrison, Jenny (9221025) Actions
CPS Family - Ongoing 03/26/2003 Daisy, Dan Milwaukee-Admin 360 Circle Street, Milwaukee, WI 53212

Jones, Sally (9222753) Actions
CPS Family - Initial Assessment 02/06/2012 Daisy, Dan Milwaukee-Region 2 123 Main Street, Waldo, WI 53093

Access Reports

Assessment

Assessment Pending 02/06/2012

Assets and Income

Assignment

Related People

Click to Maintain Assessment

6. On the Assessment page, click on the Results tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.

Assessment - Windows Internet Explorer

eWiSACWIS

TM Print Spell Check Help

Assessment **Report**

Name: Jones, Sally Assessment ID: 9222036 Status: Open Response Time: Within 5 business days Date: 02/03/2012

Participants Basic Allegations Contacts Results

Assessment Results
Result: **Substantiated**

Disposition

Family RA Future A/N
Abuse Score:
Neglect Score:
Risk Level:

Safety Assessment
Safety Decision: Unsafe

Strengths and Needs
Needs Level:

Initial Face-to-Face Contact Information
Initial Face-to-Face Must Occur By: 02/10/2012 12:25 PM [CPS Report 9238179](#) [Create Initial Face-to-Face Contact Note](#)
Initial Face-to-Face Documented:

Options: Go Save Close

Done Trusted sites | Protected Mode: Off 100%

7. On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the Search hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants group box, you can change the selected participants by clicking on the desired names. Use the 'Ctrl' key to select more than one participant. Click the Add Contacts hyperlink to add them to the Assessment Contact Information group box, shown on the next page.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

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 - End Time: 00:00 AM ☐ PM ☐
 - Duration: 0000.0
 - ☐ Billable
 - Type: Initial Face-to-Face
 - Type Detail:
 - Face-to-Face Location: Home Visit
 - Face-to-Face Result: Occurred
 - ☐ View Inactive Participants
 - Participants:
 - Jones, Dirk (Present Spouse)
 - Jones, Mary (Bio Child)
 - Jones, Robert (Bio Child)
 - Jones, Sally (Reference Person)
 - Jones, Tammy (Bio Child)
 - Jones, Tommy (Bio Child)
 - Hold down the 'Ctrl' key for multi-selection
 - [Add Contacts](#)
- Narrative:**
 - Case Note 1/1 [Details](#)
 - [Create Structured Case Note](#)
 - Enter narrative text here...
 - [More...](#) [Less...](#) [Default](#)
- Options:** [Go](#)
- Buttons:** [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

The browser status bar at the bottom shows 'Done', 'Trusted sites | Protected Mode: Off', and '100%' zoom.

8. Click the Add Contacts hyperlink found beneath the Participants box to populate the participants selected in the Participants group box at the top of the page to the Assessment Contact Information group box. To add participants not listed in the Participants box above, click the Insert button. The Begin Date is the date and time the Assessment this note is being linked to was created.

Case Notes - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

hold down the Ctrl key for multi-selection
[Add Contacts](#)

Narrative
Case Note 1/1 [Details](#)
Enter narrative text here...
[More...](#) [Less...](#) [Default](#)

Assessment Contact Information

Assessment Contact Information
Begin Date: 02/03/2012 12:25 PM

Name	Affiliation	Title	Contact Date	
Jones, Sally			02/06/2012 01:00 AM PM	Delete
Jones, Tommy			02/06/2012 01:00 AM PM	Delete

[Insert](#)

Options: [Go](#) [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

Done Trusted sites Protected Mode: Off 100%

9. Click the Save button to save the page, then click the Close button.

Ongoing Face-to-Face Contacts

1. To create an Ongoing Initial Face-to-Face Contact, go to the Cases tab and click the Create Case Work hyperlink [Create case work](#) to open the Case Work page or select Create Case Note from the Actions drop-down next to the specific case to open the Case Notes page. On the Case Work page, select Narrative > Ongoing Services. Select the case and participant(s), and click Create. This will open the Case Notes page.

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Print Help

Create Case Items

- Administration ▼
- Adoption ▼
- Agreements/Notices ▼
- Assessment ▼
- Case/Perm Plan ▼
- Education ▼
- Eligibility ▼
- ICPC ▼
- ICWA ▼
- Imaging ▼
- Legal ▼
- Narrative ▼
- Payment ▼
- Permanency Consult ▼
- Placement/Services ▼
- Planning ▼
- Safety ▼
- Safety Services ▼

Cases

Burns, Frank (70000026)
Financial, Display (8215649)
Kellogg, Kathy (70000008)

Create Case Items

- Administration ▼
- Adoption ▼
- Agreements/Notices ▼
- Assessment ▼
- Case/Perm Plan ▼
- Education ▼
- Eligibility ▼
- ICPC ▼
- ICWA ▼
- Imaging ▼
- Legal ▼
- Narrative ▼
- Payment ▼
- Permanency Consult ▼
- Placement/Services ▼
- Planning ▼
- Safety ▼
- Safety Services ▼

Cases

Burns, Frank (70000026)
Financial, Display (8215649)
Kellogg, Kathy (70000008)

Create Case Items

- Administration ▼
- Adoption ▼
- Agreements/Notices ▼
- Assessment ▼
- Case/Perm Plan ▼
- Education ▼
- Eligibility ▼
- ICPC ▼
- ICWA ▼
- Imaging ▼
- Legal ▼
- Narrative ▼
- Payment ▼
- Permanency Consult ▼
- Placement/Services ▼
- Planning ▼
- Safety ▼
- Safety Services ▼

Cases

Burns, Frank (70000026)
Financial, Display (8215649)
Kellogg, Kathy (70000008)

Create Case Items

- Administration ▼
- Adoption ▼
- Agreements/Notices ▼
- Assessment ▼
- Case/Perm Plan ▼
- Education ▼
- Eligibility ▼
- ICPC ▼
- ICWA ▼
- Imaging ▼
- Legal ▼
- Narrative ▼
- Payment ▼
- Permanency Consult ▼
- Placement/Services ▼
- Planning ▼
- Safety ▼
- Safety Services ▼

Cases

Burns, Frank (70000026)
Financial, Display (8215649)
Kellogg, Kathy (70000008)

Create Case Items

- Administration ▼
- Adoption ▼
- Agreements/Notices ▼
- Assessment ▼
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- Education ▼
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- Imaging ▼
- Legal ▼
- Narrative ▼
- Payment ▼
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- Placement/Services ▼
- Planning ▼
- Safety ▼
- Safety Services ▼

Cases

Burns, Frank (70000026)
Financial, Display (8215649)
Kellogg, Kathy (70000008)

Create Case Items

- Administration ▼
- Adoption ▼
- Agreements/Notices ▼
- Assessment ▼
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- Placement/Services ▼
- Planning ▼
- Safety ▼
- Safety Services ▼

Cases

Burns, Frank (70000026)
Financial, Display (8215649)
Kellogg, Kathy (70000008)

Create Case Items

- Administration ▼
- Adoption ▼
- Agreements/Notices ▼
- Assessment

- The Case Notes page opens. Enter the date the contact occurred in the Date field, select Initial Face-to-Face Contact for the Type, enter the Face-to-Face Location, and Face-to-Face Result. Finally, enter the Narrative.

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eWiSACWIS UAT Case Notes - Internet Explorer

Case: Sea, Big (8423957) Worker Creating Note: Sachithanandam, Priya Worker Making Contact: Sachithanandam, Priya [Search](#)

Case Note ID: Date Entered: 06/08/2016 11:54 AM ☐ Note Finalized ☐ Contact By Designee

Note Information

Date: 10/10/2014 Category: Ongoing Services ☐ View Inactive Participants

Begin Time: 08:00 AM PM Type: Initial Face-to-Face Participants:

End Time: 09:30 AM PM Type Detail: Face-to-Face Location: School / Work Sea, Big (Reference Person)

Duration: 0.5 Face-to-Face Result: Occurred Sea, Blue (Adoptive Child)

☐ Billable Hold down the 'Ctrl' key for multi-selection Sea, Little (Bio Child)

Sea, Mini (Bio Child)

Narrative

Case Note 1/1 [Details](#) [Create Structured Case Note](#)

enter case note here

[More...](#) [Less...](#) [Default](#)

[Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

90%

- Click the Save button to save the page, then click the Close button.